

# Travel Services

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## End User Procedures

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## Travel

### Overview

Travelers and approvers shall follow the [Travel Policy](#) and the procedures within this document and training videos available at [Louisvilleky.gov/Travel](https://Louisvilleky.gov/Travel). These training tools will adequately prepare travelers, request approvers, and expense report approvers for the travel program.

### Per Diem and Reimbursements

All per diem is reimbursed. This is captured during the submission of the traveler's expenses and will be reimbursed through the employee's payroll when the traveler has an approved expense report submitted at the end of a trip.

Hardship advances for Per Diem may be issued with approval from Director and Chief.

### Travel Card User Workflow



## Request to travel

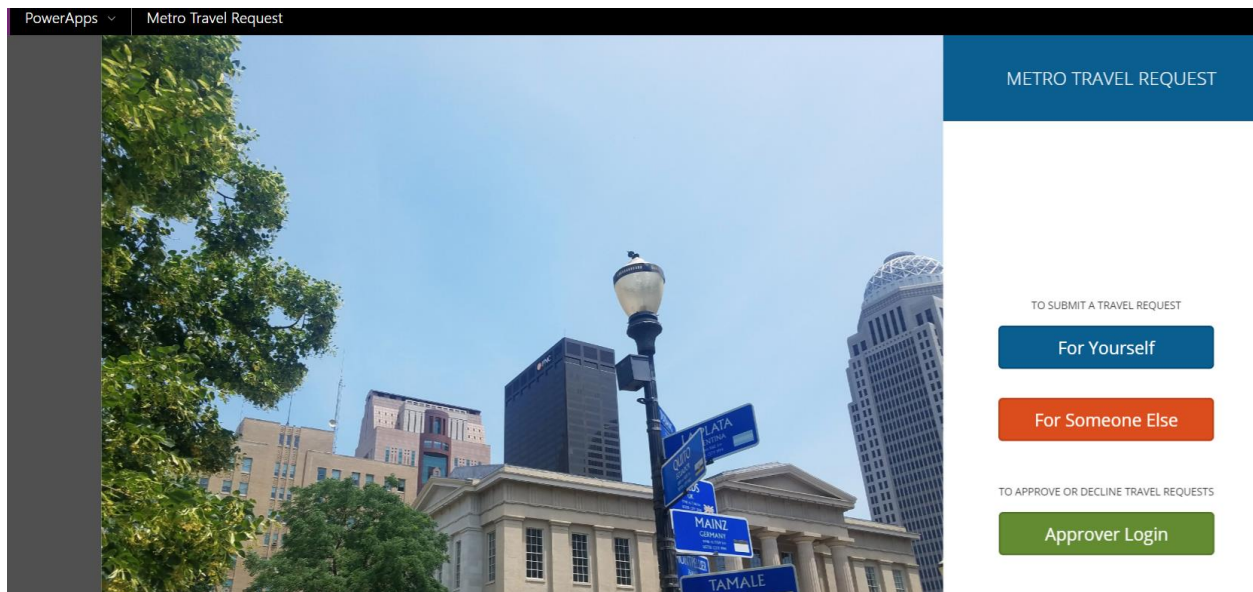
### Submitting a Request to Travel

When a need to travel is identified, the traveler must submit a Travel Request with all required fields completed and any additional information or documentation attached, supporting the trip details. Trip details should include, but are not limited to, the conference/training agenda that will be used to determine Per Diem reimbursement when travel is completed. Traveler should provide justification and conference or course name in the description field to identify trip.

The traveler or arranger must submit a request even if an external source is covering or reimbursing Metro for the trip. Metro has a 'duty of care' responsibility for all employees traveling on behalf of Metro. Travelers should note in comments if external source is covering any expenses.

If an external source is paying for all the trip expenses in full upfront and no reimbursement from Metro is required, the traveler or arranger should put \$0.00 in the cost breakdown fields. If only paying for a portion of the expenses, only enter the amount in which Metro must pay in the cost breakdown fields. This will ensure the card is activated for the amount of incidentals or other allowable expenses on the Travel Card.

If an external source is reimbursing Metro, the traveler or arranger, should put in total in the cost breakdown field, so the limits of the Travel Card can be established to cover the trip until reimbursed.



A Traveler or Arranger can request travel by clicking on the corresponding button – For Yourself or For Someone Else. If a card has not been ordered for a traveler, the profile screen will appear to initiate a card order for the traveler by Travel Services. The traveler will be notified when their card is available.

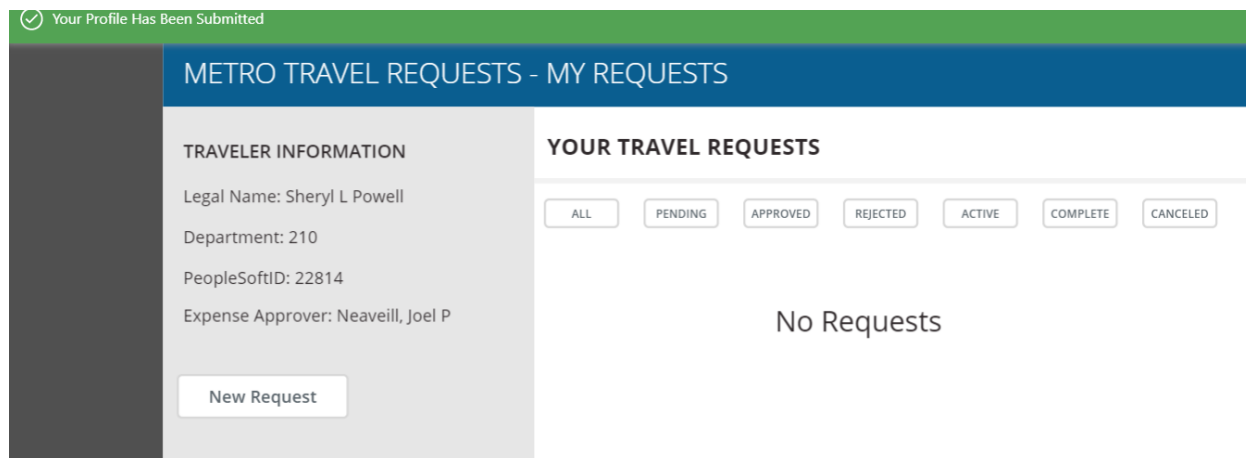
METRO TRAVEL REQUESTS - CREATE PROFILE Welc

Fill Out Form Below To Create Travel Request Profile

* First Name (Legal Name) <input type="text"/>	Middle <input type="text"/>	* Last Name <input type="text"/>
* PeopleSoft ID Number <input type="text"/>	Cell Phone <input type="text"/>	* Department Number <input type="text"/>
* Expense Approver <input type="text" value="Type the name of your expense approver"/>		
<input type="button" value="Submit"/>		

**\*Expense Approver must be someone with budgetary knowledge**

Once the profile is completed the app will allow the traveler to begin requesting travel. Click New Request to begin the process.



The Traveler will fill in the required fields (\*) and attach supporting documentation. Prior to clicking submit, the traveler must complete the cost breakdown of all estimated expenses in the Cost Breakdown fields, which will calculate the amount needed on the travel card and to provide the total cost of the trip requested to the Request Approver.

This estimate will determine the limit to establish on the Travel Card. When booking, if an estimate entered was \$200 less than the actual booking, the traveler should email [Travel@louisvilleky.gov](mailto:Travel@louisvilleky.gov) and copy their travel request approver to notify Travel Services an increase on the card is needed to avoid declines on the card while traveling.

When submitting a request, the estimate should be as close as possible to the actual value of your trip. Outlined below are some resources that should be utilized to help with the estimate.

1. Airfare
  - a. Use Concur to estimate flight costs as they are competitive and include all taxes and fees. In addition, booking is configured to our Travel Policy.
2. Hotel
  - a. Conference rates of hotels may not be available in Concur, so estimate based on the host rates available.
3. Registration
  - a. Registration costs for conference/training
4. Per Diem
  - a. Per Diem is reimbursed based on the [GSA guidelines](#). You can enter city information as well as travel dates in order to best estimate your Per Diem Allowance.
    - i. Note: Travel days allow 75% of Per Diem for the first and last day.
5. Rental Car
  - a. Estimate of car rental should be obtained from Concur
6. Misc. – Taxi, Baggage, etc.

- a. Uber or Lyft may be used under a business profile or using your LMG email address.
  - b. LMG allows for one bag each way per traveler unless approved in advance and noted on the required
7. Personal Mileage
  - a. Estimate based on current rates listed as Privately Owned Vehicle (POV) under [GSA.gov](https://www.gsa.gov)

METRO TRAVEL REQUESTS - SUBMIT REQUEST

\* City, State

\* Travel Description

\* Departure Date

\* Return Date

\* Travel justification and benefit to Metro

Comments

Attachments

There is nothing attached.

Attach file

Cost Breakdown - All charges to be incurred by Metro and any personal reimbursement (Ex: Per Diem and Mileage)

Airfare	Hotel	Registration	Per Diem	Rental Car	Misc Ex: Taxi, Baggage	Personal Mileage
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Account Code

Fund

Dept #

Division

Unit Activity

\* Request Approver Email

Form incomplete. Please fill out all **fields** and **dates** correctly.

\$0 Estimated Metro Travel Card

\$0 Estimated employee reimbursement

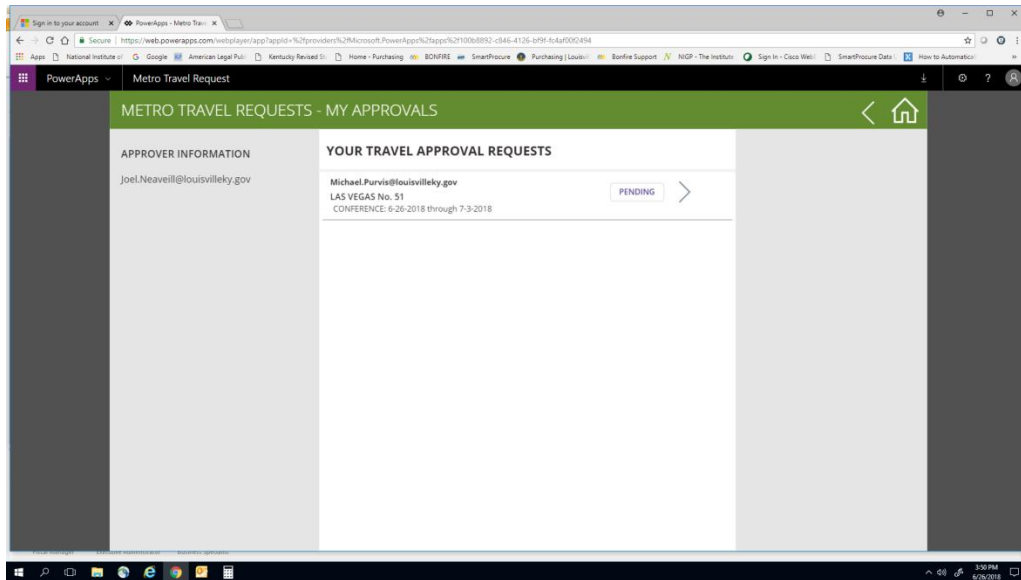
**\$0 Total Estimated Travel Cost**

Travel approved

## Approving a Travel Request

Travel Request Approvers are responsible for reviewing travel requests to ensure the trip is intended for a business purpose and is an appropriate use of Metro funds. The approver will receive a notification when there is a travel request pending their approval.





The approver will have the ability to return or approve a request. A request may be returned if more information is needed or if the trip is not approved. The approver should acknowledge exceptions if on a request. For example: A Hardship Form attached or special comments related to the travel, such as, additional luggage required. By approving the request, the approver is acknowledging and approving the exceptions.

Airfare	Hotel	Registration	Per Diem	Rental Car	Misc	Breakdown Total
\$ 600	\$ 1,000	\$ 200	\$ 200	\$	\$	\$ 2,000

Fund	Dept. #	Division	Unit Activity	Account Code
1101	210	1234	12333	523583

Approved travel requests are submitted to Travel Services for review. If more information is needed, such as an agenda or schedule for the training or conference, Travel Services will return the

request and the traveler will have to resubmit the request for approval with the information required.

Travel Services will order the traveler a card if needed and the traveler will be notified when card is ready for use to book their trip. Travel Services sets card limits based on the approved travel request estimate to cover trip expenses, the traveler is then notified the card is ready to be used to book their travel arrangements.

Book travel

## Setting up a Concur Traveler Profile

All cardholders and expense approvers will be provided access to Concur. Concur can be directly accessed through the Metronet with SSO (Single Sign On). If traveling, Concur can be accessed online via [concur.solutions.com](https://concur.solutions.com) using traveler's email address as the user id and the password updated on the traveler Profile in Concur.

Travelers and Arrangers may also view the available Profile Set up Training video or follow the steps below to set up their travel profile in Concur. Concur will prompt user to complete their Travel Profile before booking is allowed. The profile includes, but is not limited to, TSA requirements, Travel Card information, Contact Information, Password change, card info, and Arranger information if an arranger is used to book travel, see next section, "Setting up an Arranger".

At the top of the screen click Profile> Profile Settings> Personal Information. Below is the order in which you will see the information to update. If you have any trouble email [travel@louisvilleky.gov](mailto:travel@louisvilleky.gov)

- Contact Information as it appears on driver's license or personal identification cards.
  - Middle Name (check the box if your middle name is not on your license)
  - Department #
  - Work Address
  - Phone Number
- Travel Preferences - Optional
  - Enter any preferences for air travel or hotel stay
  - Enter Frequent Traveler Programs
- TSA Requirements
  - Enter your date of birth and gender
  - Enter TSA PreCheck # if applicable
- Assistants and Travel Arrangers – See next section "Setting up an Arranger"
- Travel Card Information

- Display Name can be “Travel Card” – this is the name that will show for you to select
- Card Type = Visa
- Enter your travel card information as it appears on your card.
- Click all boxes so that the Travel Card is the default option
- The Billing address is: 611 West Jefferson Street, Louisville, KY 40202
- Click Save
  - This will save all the information you have changed and keep you on the current screen. Look for the green Profile Saved icon at the top right-hand corner of the screen below the “Profile” button.

You will also need to update your password from the generic one set up for you. Follow the steps below to make that adjustment. At the top of the screen click Profile, Profile Settings, and then Change Password.

- Old password is Welcome+your Employee id. (WelcomeXXXXXX)
- Enter New Password
- Click Submit
- Log into Concur with new password

## Setting up an Arranger

Within the Profile Settings, go to the section titled Assistants and Travel Arrangers and click Add an Assistant as shown below:

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

☐ Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers + Add an Assistant

You currently have no assistants defined.

Type the name of your Travel Arranger in the space provided, select the box which reads ‘Can Book Travel’, and click Save.

Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Purvis, Michael

Purvis, Michael  
michael.purvis@louisvilleky.gov  
502-574-3712

number in their profile cannot be designated as primary assistant for travel.

Save Cancel

If your Travel Arranger's name does not appear to select, you must have the Travel Arranger submit the electronic Arranger Form available on the Travel Services website. Travel Services will set up a Concur profile and notify the arranger it has been completed. Once they have access to Concur, their name should appear as an available Arranger to be selected under a traveler's profile.

## Booking Travel

Travelers and Arrangers should view the training video prior to booking in Concur. Booking in Concur is similar to other booking tools used online (ex: Expedia). Prices are competitive and the prices shown include all taxes.

An agent booking fee will be charged through our contracted Travel Agent CTM (Corporate Travel Management). The fee is minimal, but it is strongly recommended to book Air, Hotel, and Transportation at the same time, if possible, to minimize fees.

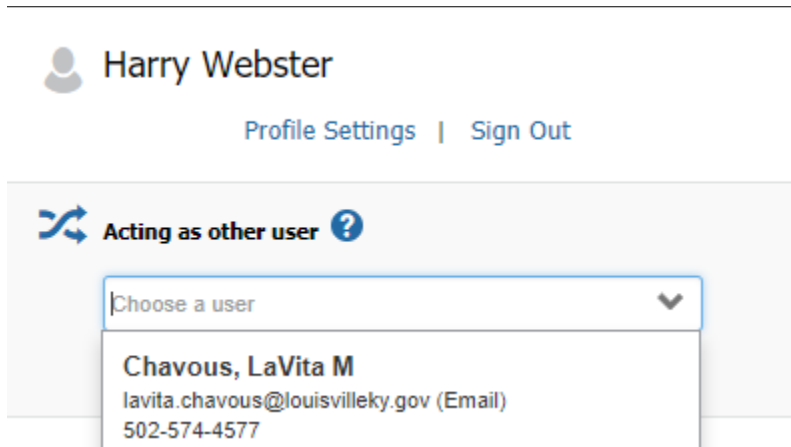
All travel should be booked in Concur, unless the training or conference is held at a Host hotel in which registration and lodging is included. Concur does not have the host hotel rates offered, so the travel card may be used to pay for the registration and lodging outside of Concur. However, you should ensure that the Conference Rate is cheaper than the rate in Concur before calling to book. Flight and Transportation should always be booked through Concur.

## Booking Group Travel

It is recommended booking travel for a large group (**5 or more**) should be done by contacting the travel agent on contract to make the arrangements. The contact information can be found on the main travel page in Concur (Company Notes). There is a fee of \$25 per person during normal business hours. After hours assistance with booking will be \$50 per person. Normal business hours are 8:00am – 5:00pm EST.

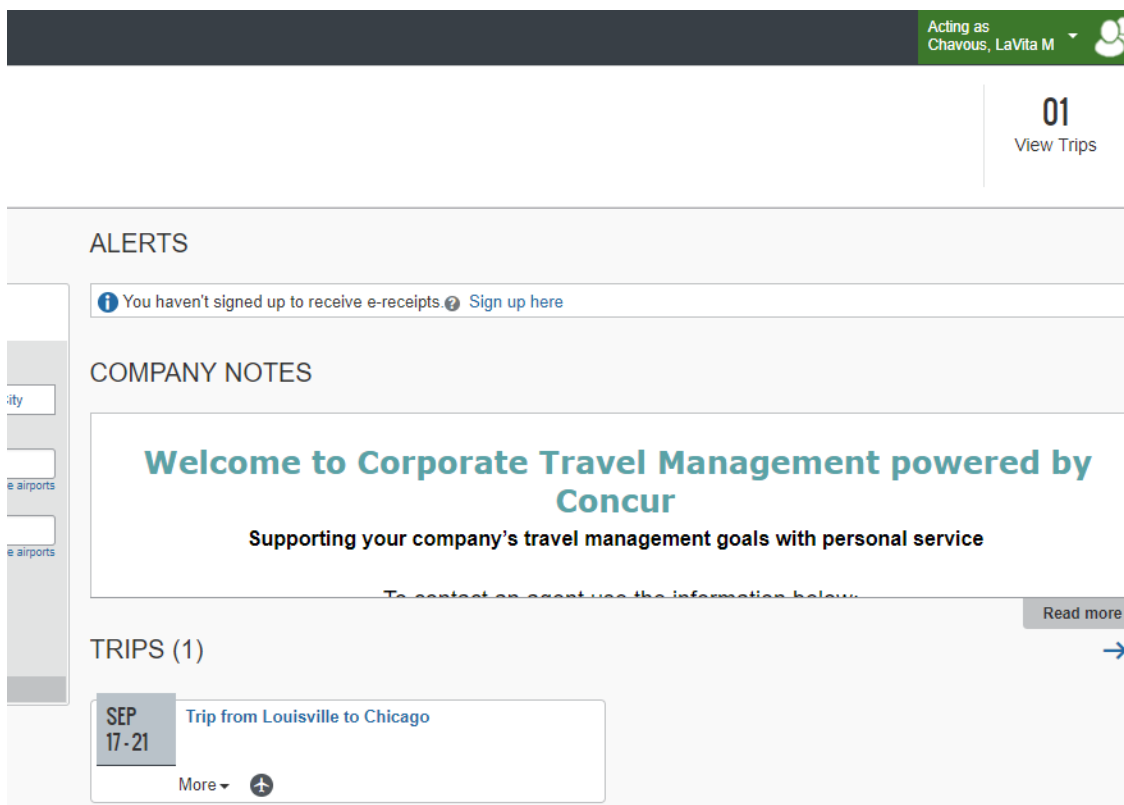
For small groups, the Arrangers may use the cloning feature or report template to book the same trip for more than one traveler. The report template can also be saved for a traveler if they frequently have a need to go on the same trip.

As an arranger, you will act as the traveler you are booking for. To act and book on behalf of a traveler, select them from your Profile as follows:



## Booking using Cloning Option

Once you have booked the first traveler's trip, choose the trip from that user's main page you wish to clone for another traveler. In this case, the Louisville to Chicago trip shown.





The trip details will appear. Select Clone Trip from the menu on the left as shown:

## Travel Details

**TRIP OVERVIEW**

**I want to...**  
[Print Itinerary](#)  
[E-mail Itinerary](#)  
[Open in Outlook](#)  
[View Trip History](#)  
[Create Template](#)  
[Clone Trip](#)  
[Share Trip](#)  
[Cancel Entire Trip](#)

**Trip Name:** Trip from Louisville to Chicago [\(Edit\)](#)  
**Start Date:** September 17, 2018  
**End Date:** September 21, 2018  
**Created:** June 06, 2018, Harry Webster *(Modified: August 06, 2018)*  
**Description:** (No Description Available) [\(Edit\)](#)  
**Agency Record Locator:** SAWFFK  
**Ticket Number(s):** 0167133988067  
**Passengers:** Lavita Marie Chavous  
**Total Estimated Cost:** \$258.91 USD [\(Details\)](#)  
[Change frequent flyer program](#)

**Add to your Itinerary**  
 [Car](#)  [Hotel](#)

**RESERVATIONS**

Monday, September 17, 2018

From the next screen, choose the traveler you wish to include on this trip from the drop-down menu. Click Apply, and then click 'Next' at the bottom of screen to continue booking.

Concur will search for same flights, hotels, etc. and provide the same or closest options of what is currently available. Remember, you can only arrange for travelers for which you are assigned an arranger. Select the traveler's name and click apply to proceed to book for the additional traveler. Contact Travel Services if you experience any issues.

SAP Concur

Travel

Travel

Trip Library

Templates

Tools

# Clone Trip

Trip Name: Trip from Louisville to Chicago

Book for traveler: 

Parks, Shara

Apply

[View Trip Information](#)

☒ Search for these specific flights
 ☐ I would like to do a general search
 ☐ Refundable only air fares

Depart Date:

09/17/2018

✈

Louisville Intl-Standiford Field, Louisville, KY, United St  
 O'Hare Intl Airport, Chicago, IL, United States of Ameri  
 United (UA) Flight Number 4097 Depart After 10:45 AM (Economy)

Depart Date:

09/21/2018

✈

Chicago O'Hare Intl Airport, Chicago, IL, United States  
 Intl-Standiford Field, Louisville, KY, United States of An  
 United (UA) Flight Number 3590 Depart After 3:50 PM (Economy)

## Booking from a Template

A travel arranger may decide the easiest way to book a group of travelers would be to create a template and then book for each individual traveler by utilizing this template. The arranger will begin by going to 'Travel' > 'Templates' and either select or create one.

To create a template, select Add New Template

SAP Concur

Travel

Expense

Approvals

Reporting

App Center

Administration

Help

Profile

Travel

Arrangers

Trip Library

Templates

Tools

# View Travel Templates

[Booking for myself](#) | [Book for a guest](#)

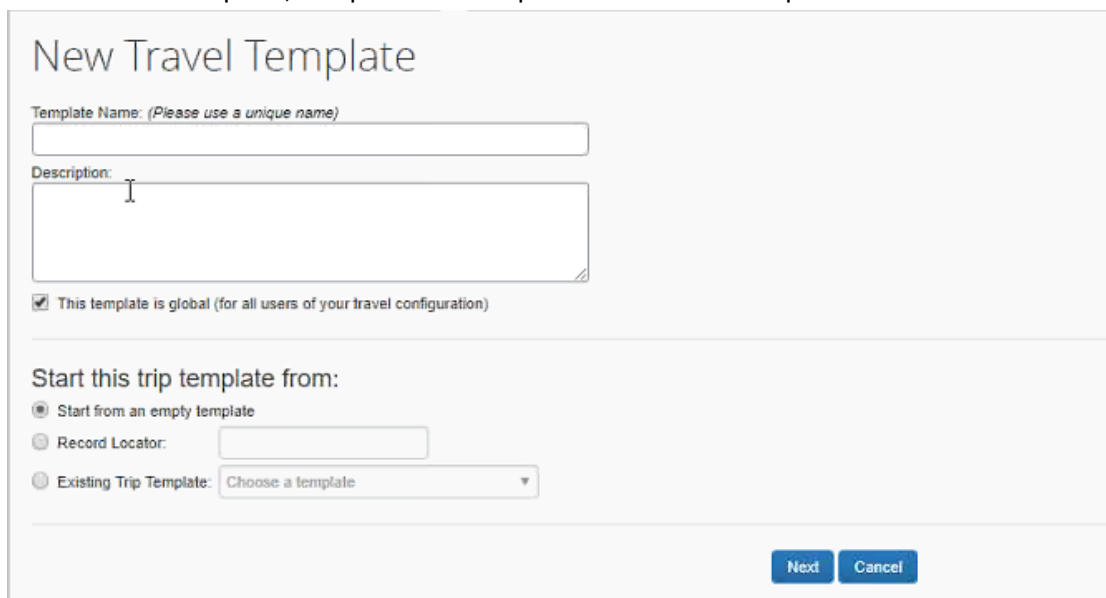
You may choose from one of these pre-defined trip templates to speed your booking process. Simply select the trip you want to take, and Concur will use all the pre-defined travel information to book your trip. If you travel to the same locations repeatedly, you may create your own template, or use one defined by your travel management staff.

PERSONAL TRAVEL TEMPLATES -- **SHERYL L POWELL** [Add New Template](#)

Template Name▲	Created by	Description
No records found.		

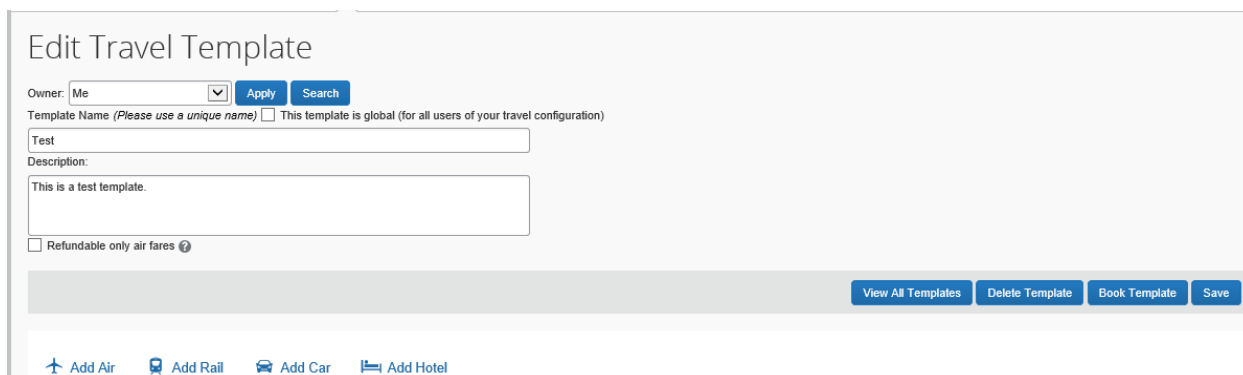
COMPANY TRAVEL TEMPLATES [Template Administration](#)

To create the template, complete the Template Name and Description and select next.



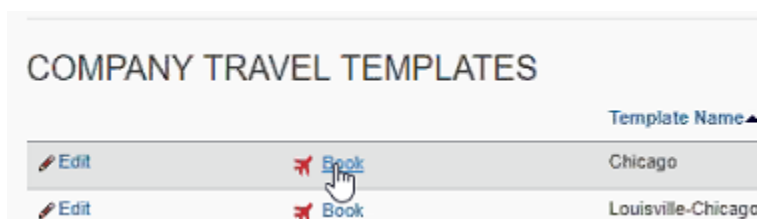
The 'New Travel Template' form includes a title 'New Travel Template'. Below it is a 'Template Name' field with a placeholder '(Please use a unique name)'. A 'Description' field follows, with a cursor at the start. A checkbox labeled 'This template is global (for all users of your travel configuration)' is checked. The section 'Start this trip template from:' contains three options: 'Start from an empty template' (selected with a radio button), 'Record Locator' (with an empty text field), and 'Existing Trip Template' (with a dropdown menu showing 'Choose a template'). At the bottom right are 'Next' and 'Cancel' buttons.

Now begin selecting the criteria for each item needed for the trip such as transportation and hotel information, then select save.



The 'Edit Travel Template' form shows the template name 'Test' and description 'This is a test template.' It includes a checkbox for 'Refundable only air fares' which is unchecked. At the top, there is an 'Owner' dropdown set to 'Me' with 'Apply' and 'Search' buttons. A 'Template Name' field with a placeholder '(Please use a unique name)' and a checkbox for 'This template is global' are also present. At the bottom, a row of buttons includes 'View All Templates', 'Delete Template', 'Book Template', and 'Save'. Below this is a navigation bar with icons and labels for 'Add Air', 'Add Rail', 'Add Car', and 'Add Hotel'.

This template will now be available on the arranger's template page. To utilize it select the Book Template function to continue booking process.



COMPANY TRAVEL TEMPLATES		
		Template Name
Edit	Book	Chicago
Edit	Book	Louisville-Chicago

Next, select the traveler you would like to book for in the 'Book for Traveler' and then select Apply and then Next this will bring up all of the flights or reservations which match the template the closest, if not exact. Click Next to continue with booking process.



## Run Template

Template Name: Chicago

Book for traveler: Chavous, LaVita M.

☒ Search for these specific flights ☐ I would like to do a general search ☐ Refundable only air fares

Depart Date:  
09/17/2018

✈ Louisville Intl-Standiford Field, Louisville, KY, United States of America (SDF) to Chicago O'Hare Intl Airport, Chicago, IL, United States of America (ORD)  
United (UA) Flight Number 4097 Depart After 10:45 AM (Economy)

Depart Date:  
09/21/2018

✈ Chicago O'Hare Intl Airport, Chicago, IL, United States of America (ORD) to Louisville Intl-Standiford Field, Louisville, KY, United States of America (SDF)  
United (UA) Flight Number 3590 Depart After 3:50 PM (Economy)

Travel

## Traveling with the Card

Be sure to have your travel card and proper ID required when traveling. If a traveler needs to change travel arrangements for any reason, those changes should be made through our contracted Travel Agent via email - [louisville@travelctm.com](mailto:louisville@travelctm.com) or by phone at 1-800-874-7248.

The travel card should not be used for personal expenses while traveling. Personal expenses, such as room service or movies at a hotel, should be charged to a personal credit card and will not be reimbursed.

If the card is declined while traveling, contact the Travel Services ([Travel@louisvilleky.gov](mailto:Travel@louisvilleky.gov)) to determine the reason. If outside of normal business hours, you can call the number on the back of your card to determine the reason.

If funds are not available, Travel Services will need approval from your Trip Request Approver to increase the limit on the card. Justification and approval email will be obtained from your approver.

If no response is received or it's outside of normal business hours, the traveler will need to cover the additional expense not estimated with their own funding and reimbursement is not guaranteed.

## Reconcile Travel

### Preparing Expense Reports

Travelers will receive notification to submit an expense report for approval within 15 days based on their travel end date. Expenses may be incurred weeks or months in advance of a trip. However, only one expense report should be submitted per trip/Request #. The traveler will create one expense report using the Request # assigned for the approved travel request in the Report Header.

There are two types of expenses on an Expense Report in Concur:

- Expenses imported from the Bank – Travel Card Charges  
*\*\*\*These charges should have the orange/red card icon to the left of the date. If it does not, and the purchase was placed on the card ensure that the "Payment Type" does not indicate "Cash".*
  - Expenses are imported to Concur from the bank when transactions are made on the user's card. These transactions will show up in Concur as 'Available Expenses' when they are imported to Concur by the bank. It may take several days before a transaction becomes available in Concur after a card is swiped or used.
- Expenses entered by Traveler – Cash (out of pocket expenses)  
*\*\*\*These charges will always show as "Cash" when entered in Concur*
  - Miscellaneous expenses using personal funds
  - Per Diem
  - Personal Mileage

### Processing Imported Travel Card Expenses

To begin, we will assume the traveler (Cardholder) has already completed their trip, all transactions made on the travel card are in Concur, and the traveler is ready to submit their Concur Expense Report for approval and to claim their per diem or allowed miscellaneous expenses. In the case where two trips are in process, the traveler shall submit a separate expense report for each approved request (trip) #.

1. The traveler will log into Concur and view these expenses by taking the following steps:
  - a. At the top of the page go to the Expense tab>Manage Expenses> scroll down the page to see the available expenses section.

**Manage Expenses**

ACTIVE REPORTS

THERE ARE NO ACTIVE EXPENSE REPORTS. Click **Create New Report** to create a new report.

AVAILABLE EXPENSES

All Corporate and Personal Cards

Card Program Type	Expense Detail	Expense Type	Source	Date
<input type="checkbox"/>	American Airlines FORT WORT...	Airfare		04/19/2018
<input type="checkbox"/>	AGENT FEE 8900733106011 SE...	Airfare		04/19/2018

Enable Expense Assistant and these expenses will be placed on a report for you. [Learn More](#)

AVAILABLE RECEIPTS

- b. In the small drop-down menu, the default 'All Corporate and Personal Cards' is shown. Change this option by clicking the drop-down and selecting the Fifth Third Bank Corporate Card – Travel Card option to view all charges made on the card.

2. After viewing the expenses for a particular trip, the traveler should select all relevant expenses for the trip completed by clicking the check box to the left and then move the expenses to a new report by selecting the Move >To New Report option.

Fifth Third Bank Corporate Card - Travel Card - 8655

Card Program Type	Expense Detail	Expense Type	Source	Date	Amount
<input type="checkbox"/>	American Airlines 8004337300, TX	Airfare		02/05/2022	\$30.00

3. The new report will be created and the traveler will create the expense report header.
  - a. Report Name – Free text to enter trip information. (Ex: GFOA Conference 2018-Chicago)
  - b. Request # - This number is the approved request # for the trip that must be entered.
  - c. Fund/Dept Division/Unit Activity – The cost center string entered by the header will be the default account allocated to each individual charge. However, this can be changed on an individual expense basis. Once finished, the traveler will select 'Create Report' in the bottom right corner of the screen.

**Create a New Expense Report**

Report Header

Policy: \*LJC Travel Policy

Report Name: TR# 1234567

Report Date: 05/15/2018

Comment: Trip from Louisville to Savannah (VLJUCQ)

Fund: General Fund

Department: (500) Develop Louisville

Division: (3330) Adv Planning & Susta

Unit Activity: (333002) Office of Advanced

Authorization Requests

Request Name	Request ID	Request Total	Amount Approved	Amount Remaining
--------------	------------	---------------	-----------------	------------------

- d. The report is created, and all the selected charges are assigned to it for processing. For illustration purposes only we named this report Trip # 1234567:

TR# 1234567

[+ New Expense](#) [Import Expenses](#) [Details](#) [Receipts](#) [Print](#)

Expense Type	Date	Amount	Exception
Airfare	04/19/2018	\$451.11	Missing required field: Business Purpose.
Airline Fees	04/19/2018	\$9.00	Missing required field: Airline Fee Type Code, Business Purpose.

Expenses [Move](#) [Delete](#) [Copy](#) [View](#)

[Date](#) [Expense Type](#) [Amount](#) [Requested](#)

Adding New Expense

<input type="checkbox"/>	04/19/2018	Airfare AMERICAN AIR0017133988015, F	\$451.11	\$451.11
<input type="checkbox"/>	04/19/2018	Airline Fees AGENT FEE 8900733106011, Sea	\$9.00	\$9.00

New Expense

Expense Type

To create a new expense, click the appropriate

- 01. Travel Expenses ...02
  - Hotel Pt
  - Incidentals Pt
  - Laundry Tc
- 02. Transportation Tc
  - Airfare Tr
  - Airline Fees 03.1
  - Car Maintenance/Repair Dr

Expense [Available Receipts](#)

Expense Type: Airline Fees

Airline Fee Type Code: None Selected

Transaction Date: 04/19/2018

Business Purpose: test

Vendor:

Enter Vendor Name: AGENT FEE 8900733106011

City of Purchase: Seattle, Washington

Payment Type: US Bank Travel Card

Amount: 9.00 USD

☐ Personal Expense (do not reimburse)

Comment:

Fund: General Fund

Department: (506) Develop Louisville

Division: (3330) Adv Planning & Sustai

Unit Activity: (333002) Office of Advanced I

[Save](#) [Itemize](#) [Allocate](#) [Attach Receipt](#) [Cancel](#)

4. Allocating the Expense – Select the expense and complete the required fields in red and make sure the full account string is appropriate for the expense. The Traveler and Approver can change this information if necessary.
  - a. Note: If you select Agent Fee for the agent fee expenses, a receipt is not required.
5. Attach the itemized receipt to the expense – Select Attach Receipt and choose the receipt from available receipts or select browse to locate the receipt where stored.
6. Select Save to complete the transaction. Continue to allocate and attach receipts until all imported expenses requiring receipts have been processed for the trip.

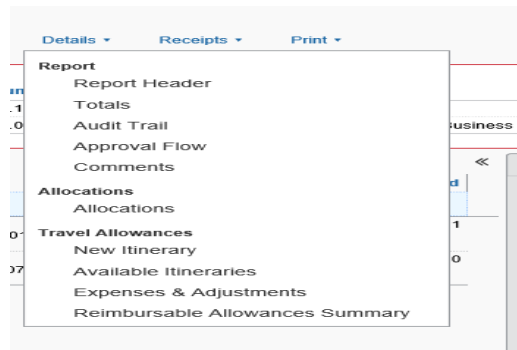
## Per Diem & Misc Reimbursement

### Processing User Entered Travel Card Expenses (Per Diem, Misc, or Personal Mileage)

#### Per Diem

To be reimbursed for Per Diem; the traveler must enter Per Diem information in Concur.

1. On the expense report click Detail, then New Itinerary.
  - a. If you booked your trip in Concur you may have an Available Itinerary. If this applies, you can skip to step 7.



Note: Creating an Itinerary consists of creating Itinerary stops, these stops refer to legs of a trip such as departure and return information. Layovers are not stops and should not be entered.

2. Enter your departure information for example Departure City will be Louisville, KY and arrival city will be the city in which you are traveling to according to your request.
  - a. You will need to pick the cities from the drop-down in order to populate the information correctly.
  - b. Both date fields should match since you should arrive at your destination on the same day in which you left. There may be rare occasions this is not the case.
  - c. Times are approximate but should reflect travel time.

Travel Allowances For Report: test

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name  
test

Add Stop Delete Rows Import Itinerary

	Departure City *	Arrival City	Arrival Rate Location
No Itinerary Rows Found			

**Departure Date  
Dates Should Match**

New Itinerary Stop

Departure City  
Louisville, Kentucky

Date  
07/22/2018

Time  
2:45 PM

Arrival City  
Miami, Florida

Date  
07/22/2018

Time  
10:00 PM

Save

Go to Single Day Itineraries Next >> Cancel

3. Click Save, this will automatically switch the Departure and Arrival City to allow you to put in your return information.
4. Enter your Return information remember that Departure City will now be the city in which you traveled to, and Arrival City will now be Louisville, KY.
  - a. You will need to pick the cities from the drop-down in order to populate the information correctly.
  - b. Both date fields should match since you should arrive at your destination on the same day in which you left.
  - c. Times are approximate but should reflect travel time.

Travel Allowances For Report: test

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name  
test

Add Stop Delete Rows Import Itinerary

	Departure City *	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Louisville, Kentucky	Miami, Florida	MIAMI-DADE COUNTY, US...
<input type="checkbox"/>	07/22/2018 02:45 PM	07/22/2018 10:00 PM	

**Returned Date  
Dates Should Match**

New Itinerary Stop

Departure City  
Miami, Florida

Date  
07/26/2018

Time  
2:00 PM

Arrival City  
Louisville, Kentucky

Date  
07/26/2018

Time  
10:30 PM

Save

Go to Single Day Itineraries Next >> Cancel

5. Click Save, then Click Next.
6. From here you will see the Available Itineraries Screen. It is important to remember that in this screen you should see one blue header with your Expense Report Name and at least two lines under that show the departure and return information that was input.
  - a. If this is not the format of your Itinerary, please review the previous steps and try again.
  - b. If this is correct click Next at the bottom right hand corner of the screen. Go to step 8.

Travel Allowances For Report: test □ ×

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Edit Unassign

Departure City	Date and Time ▲	Arrival City	Date and Time	Arrival Rate Location
Itinerary: test				
Louisville, Kentucky	07/22/2018 02:45 PM	Miami, Florida	07/22/2018 10:00 PM	MIAMI-DADE COUNTY, US-FL,...
Miami, Florida	07/26/2018 02:00 PM	Louisville, Kentucky	07/26/2018 10:30 PM	JEFFERSON COUNTY, US-KY,...

7. If you booked in Concur you may have an available itinerary to complete your per diem. To check you can click “Details” and then “Available Itineraries”. If it is available, it will show in the bottom section of this screen as shown below.
  - a. From here you can click the itinerary, click Assign, then click Next.

Available Itineraries

Itineraries ▼ Delete Assign

Departure City	Date and Time ▲	Arrival City	Date and Time	Arrival Rate Location
Itinerary: test				
Louisville, Kentucky	07/22/2018 02:45 PM	Miami, Florida	07/22/2018 10:00 PM	MIAMI-DADE COUNTY, US-FL,...
Miami, Florida	07/26/2018 02:00 PM	Louisville, Kentucky	07/26/2018 10:30 PM	JEFFERSON COUNTY, US-KY,...

8. This is the Expenses and Adjustments screen and where you will indicate meals were provided on the trip which will automatically deduct from Per Diem.
  - a. Each meal has its own rate and will decrease atomically as shown below.
  - b. Please check all meals provided according to your agenda

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from <input type="text"/> to <input type="text"/> <input type="button" value="Go"/>					
Exclude   All <input type="checkbox"/>	Date/Location ▲	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	07/22/2018 Miami, Florida	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$48.00
<input type="checkbox"/>	07/23/2018 Miami, Florida	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$49.00
<input type="checkbox"/>	07/24/2018 Miami, Florida	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$48.00
<input type="checkbox"/>	07/25/2018 Miami, Florida	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$36.00
<input type="checkbox"/>	07/26/2018 Miami, Florida	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$48.00

<< Previous Create Expenses Cancel

9. When finished select Create (or Update) Expenses in the bottom right hand corner. This will pull per diem into the expense report and label it as “Daily Allowance”.

Expenses					<input type="button" value="Move ▼"/>	<input type="button" value="Delete"/>	<input type="button" value="Copy"/>	<input type="button" value="View ▼"/>	<input type="button" value="«"/>
<input type="checkbox"/>	Date ▼	Expense Type	Amount	Requested					
Adding New Expense									
<input type="checkbox"/>	07/26/2018	Daily Allowance Miami, Florida	\$48.00	\$48.00					
<input type="checkbox"/>	07/25/2018	Daily Allowance Miami, Florida	\$36.00	\$36.00					
<input type="checkbox"/>	07/24/2018	Daily Allowance Miami, Florida	\$48.00	\$48.00					
<input type="checkbox"/>	07/23/2018	Daily Allowance Miami, Florida	\$49.00	\$49.00					
<input type="checkbox"/>	07/22/2018	Daily Allowance Miami, Florida	\$48.00	\$48.00					

10. From here you should add your agenda or schedule to your first day of Daily Allowance. This will prevent delays in reimbursement.
- To add agenda, click the first day of Daily Allowance, then click Attach Receipt in the bottom right hand corner of the gray box. You can now browse your computer for the file.
  - If you were unable to attend a meal that shows provided on your agenda, you must place a comment on that day's allowance. It is assumed that you will attend all meals that are provided by the conference or training.



TR# 1234567

[+ New Expense](#) [Import Expenses](#) [Details ▾](#) [Receipts ▾](#) [Print ▾](#)

#### Exceptions

Expense Type	Date	Amount	Exception
Airfare	04/19/2018	\$451.11	❗ Missing required field: Business Purpose.
Airline Fees	04/19/2018	\$9.00	❗ Missing required field: Airline Fee Type Code, Business Purpose.
Daily Allowance	05/16/2018	\$29.25	❗ Missing required field: Business Purpose.

#### Expenses

<input type="checkbox"/>	Date ▾	Expense Type	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	05/19/2018	Daily Allowance Savannah, Georgia	\$31.25	\$31.25
<input type="checkbox"/>	05/18/2018	Daily Allowance Savannah, Georgia	\$46.00	\$46.00
<input type="checkbox"/>	05/17/2018	Daily Allowance Savannah, Georgia	\$46.00	\$46.00
<input type="checkbox"/>	05/16/2018	Daily Allowance Savannah, Georgia	\$29.25	\$29.25
<input type="checkbox"/>	04/19/2018	Airfare AMERICAN AIR0017133988015, F	\$451.11	\$451.11
<input type="checkbox"/>	04/19/2018	Airline Fees AGENT FEE 8900733106011, Sea	\$9.00	\$9.00

## Miscellaneous Expenses

1. The Traveler must add other allowable miscellaneous charges to be reimbursed for the trip, such as tolls, parking fees, transportation, etc. for which the merchant could not accept the travel card. Click +New Expense and select the expense type you wish to claim.

[+ New Expense](#) [Import Expenses](#) [Details ▾](#) [Receipts ▾](#) [Print ▾](#)

#### Expenses

<input type="checkbox"/>	Date ▾	Expense Type	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	05/19/2018	Daily Allowance Savannah, Georgia	\$31.25	\$31.25
<input type="checkbox"/>	05/18/2018	Daily Allowance Savannah, Georgia	\$46.00	\$46.00
<input type="checkbox"/>	05/17/2018	Daily Allowance Savannah, Georgia	\$46.00	\$46.00
<input type="checkbox"/>	05/16/2018	Daily Allowance Savannah, Georgia	\$29.25	\$29.25
<input type="checkbox"/>	04/19/2018	Airfare AMERICAN AIR0017133988015	\$451.11	\$451.11
<input type="checkbox"/>	04/19/2018	Airline Fees AGENT FEE 8900733106011, S	\$9.00	\$9.00

#### New Expense

Expense Type

To create a new expense, click the appropriate expense type below

<b>01. Travel Expenses</b>	<b>...02. Transportation</b>
Hotel	Fuel
Incidentals	Parking
Laundry	Personal Car Mileage
<b>02. Transportation</b>	Public Transport
Airfare	Taxi
Airline Fees	Tolls/Road Charges
Car Maintenance/Repairs	Train
Car Rental	<b>03. Meals</b>
	Breakfast

2. Complete the required fields in red, attach the receipt, and click Save to add to the Expense Report. If a receipt was lost or not available, the Missing Receipt Affidavit Form should be used which is available under Receipts. Those expenses without receipts will be evaluated and are not guaranteed for reimbursement.

New Expense Available

Expense Type <b>Parking</b>	Transaction Date 05/08/2018	Business Purpose <b>test</b>	Enter Vendor Name	City of Purchase	Payment Type <b>Cash</b>
Amount <b>10.00</b> USD	<input type="checkbox"/> Personal Expense (do not reimburse)	Comment	Fund <b>General Fund</b>	Department (506) Develop Louisville	Division (3330) Adv Planning & Sustai
Unit Activity (333002) Office of Advanced I					

### Personal Vehicle – Mileage

1. In addition, if a personal vehicle was approved for use, the traveler must enter those details for reimbursement of mileage associated with their overnight stay. To add personal mileage expense, click on personal car mileage from the option of expenses.

New Expense

Expense Type

*To create a new expense, click the appropriate expense type below or type the expense type in the field above.*

<b>01. Travel Expenses</b> Hotel Incidentals Laundry <b>02. Transportation</b> Airfare Airline Fees Car Maintenance/Repairs Car Rental	<b>...02. Transportation</b> Fuel Parking Personal Car Mileage Public Transport Taxi Tolls/Road Charges Train <b>03. Meals</b> Breakfast	<b>...03. Meals</b> Business Meals (Attende Dinner Lunch <b>04. Entertainment</b> Entertainment - Clients Entertainment - Staff <b>05. Office Expenses</b> Courier/Shipping/Freight
----------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

- The following mileage calculator will appear. Make sure to put the address where you started and finished, and hit Calculate Route, see details. Then click **'Make Round Trip'** and mileage both ways will be calculated.

☐ Avoid Tolls ☐ Avoid Highways

Waypoints

- 1031 S 4th St, Louisville, KY 40203, US
- 811 Spruce St, St. Louis, MO 63102, US

260.4 MI  
Personal

[Calculate Route](#) [Make Round Trip](#)

Directions

1022 S 4th St, Louisville, KY 40203, USA

261 mi. About 3 hours 54 mins

- Head north on S 4th St toward W Kentucky St 0.3 mi
- Turn left onto W Breckinridge St 0.5 mi
- Turn right onto S 9th St 0.9 mi
- Continue straight 171 ft
- Take the ramp onto I-64 W Entering Indiana 4.4 mi
- Keep left to stay on I-64 W Entering Illinois 180 mi
- Keep left at the fork to stay on I-64 W, follow signs for St Louis 71.6 mi
- Keep right to stay on I-64 W Entering Missouri 2.8 mi
- Take exit 40A toward Stadium/Tucker Blvd 0.3 mi
- Turn right onto Clark Ave/Historic U.S. 66 W 367 ft
- Turn right at the 1st cross street onto S 8th 364 ft

☐ Deduct Commute

	TOTAL PERSONAL	TOTAL BUSINESS
	0.0 MI	260.4 MI

[Add Mileage to Expense](#)

Mileage Calculator

☐ Avoid Tolls ☐ Avoid Highways

Waypoints

- 1031 S 4th St, Louisville, KY 40203, US
- 811 Spruce St, St. Louis, MO 63102, US
- 1031 S 4th St, Louisville, KY 40203, US

260.4 MI  
Personal

261.6 MI  
Personal

[Calculate Route](#)

Directions

1022 S 4th St, Louisville, KY 40203, USA

261 mi. About 3 hours 54 mins

- Head north on S 4th St toward W Kentucky St 0.3 mi
- Turn left onto W Breckinridge St 0.5 mi
- Turn right onto S 9th St 0.9 mi
- Continue straight 171 ft
- Take the ramp onto I-64 W Entering Indiana 4.4 mi
- Keep left to stay on I-64 W Entering Illinois 180 mi
- Keep left at the fork to stay on I-64 W, follow signs for St Louis 71.6 mi
- Keep right to stay on I-64 W Entering Missouri 2.8 mi
- Take exit 40A toward Stadium/Tucker Blvd 0.3 mi

☐ Deduct Commute

	TOTAL PERSONAL	TOTAL BUSINESS
	0.0 MI	522.0 MI

[Add Mileage to Expense](#) [Cancel](#)

- To add this reimbursable expense to your expense report, select **'Add Mileage to Expense'**, then enter the required fields in red, select **'Save'**.


New Expense Available Receipt

---

**View Reimbursement Rates**

Expense Type: Personal Car Mileage Transaction Date:  Purpose of the Trip:  From Location: 1031 S 4th St, Louisville, KY 40203 To Location: 811 Spruce St, St. Louis, MO 63102 Payment Type: Cash

Distance: Amount: \$22 : 279.27 USD Comment:  Fund: General Fund Department: (506) Develop Louisville Division: (3330) Adv Planning & Sustai Unit Activity: (333002) Office of Advanced I

 **Mileage Calculator**  
(Required)

Save Allocate Attach Receipt Cancel

- Personal Mileage is now on your expense report which will be reimbursed with Per Diem and other allowable Miscellaneous expenses on the report.

Expenses <span>Move ▾</span> <span>Delete</span> <span>Copy</span> <span>View ▾</span>				
<input type="checkbox"/>	Date ▾	Expense Type	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	05/19/2018 !	Daily Allowance Savannah, Georgia	\$31.25	\$31.25
<input type="checkbox"/>	05/18/2018 !	Daily Allowance Savannah, Georgia	\$46.00	\$46.00
<input type="checkbox"/>	05/17/2018 !	Daily Allowance Savannah, Georgia	\$46.00	\$46.00
<input type="checkbox"/>	05/16/2018 !	Daily Allowance Savannah, Georgia	\$29.25	\$29.25
<input type="checkbox"/>	05/15/2018	Personal Car Mileage	\$279.27	\$279.27

\*\*\*If you are driving between a hotel and conference you much add each stop.

### Submitting Expense Report for Approval

After all expenses have been processed and are on the Expense Report for the corresponding approved Travel Request #, select Submit Report (top right corner) to route to your Expense Approver. The expense approver will review and approve the expense report. If the approver does not approve or requires more information to approve, the expense report will be returned to the traveler to correct and re-submit.

Travelers requesting reimbursement for Per Diem or Miscellaneous Expenses will not be reimbursed until all outstanding (past due) expense reports have been completed. Per Diem will show as Daily Allowance on the Expense Report. Expense Reports must be submitted and approved by 9AM on the Monday before payday.

## Approval of Expense Report

### Approving an Expense Report

**Expense Approvers** should review pending reports requiring their approval in Concur. It is the approver's responsibility to review each: travel expense, the receipt attached, and verify the funding source used is appropriate. It is imperative expense reports are approved timely to avoid delays in reimbursement to the employee/traveler.

1. Click on Required Approvals

The screenshot shows the Concur Expense System dashboard. At the top, there is a header with the user's name 'Hello, Default' and a navigation bar with five items: '+ New', '01 Required Approvals', '00 Authorization Requests', '00 Available Expenses', and '00 Open Reports'. Below the header is an 'ALERTS' section with a message: 'You haven't signed up to receive e-receipts. Sign up here'. A large orange banner with an airplane icon reads: 'Reservations detail synced with Concur. Connect your favorite travel apps and accounts.' Below the banner is a 'COMPANY NOTES' section with a link to 'Concur Training Toolkit'. The 'MY TASKS' section at the bottom contains three cards: '01 Required Approvals' (with a right arrow), '00 Available Expenses' (with a right arrow), and '00 Open Reports' (with a right arrow). Below the 'Required Approvals' card, it says 'Traveler L. | carol test' and '\$0.00 — Expense'.

2. Click on the expense to review and the information appears to the right as shown.
3. Click Receipt Image to view receipts. All expenses, except for Per Diem, Personal Mileage, and Agency Booking Fee require an itemized receipt which should be attached.

carol test (JJC, Traveler)

Summary Details Receipts Print

Exceptions

Expense Type	Date	Amount	Exception
Business Meal...	05/01/2018	\$10.00	Warning: You have checked the 'Personal Expense' box. You will not get reimbursed for this claim.

Expenses

Transaction D...	Expense Type	Enter Vendor...	Business Purp...	City of Purchase	Payment Type	Amount	Adjusted
05/01/2018	Business Meals	test	test	Atlanta, Georgia	Cash	\$10.00	

Warning: You have checked the 'Personal Expense' box. You will not get reimbursed for this claim.

Expense Receipt Image

Expense Type: Business Meals (Attendees)  
Transaction Date: 05/01/2018  
Business Purpose: test  
Enter Vendor Name: test

Payment Type: Cash  
Amount: 10.00 USD  
Reviewed: No  
Personal Expense: ☒

Comment:   
Fund: Air Penalty Fees  
Department: (805) Board of Elections  
Division: (8211) Board Of Elections

Unit Activity: (020112) Election Exp/Board Of Ele

**Note: If you would like to keep a physical or electronic copy of the expense report, select the 'Print' and then select either print to PDF or send it to a printer.**

4. Verify the funding source is appropriate.
5. If the expense report is correct, the Approver will click the Approve button (in top right corner).
6. The Approver will be prompted to accept terms and responsibilities as shown. By clicking Accept, the Expense Report is sent to the Travel Services for a final review and reimbursement if required.

## Final Confirmation

### Approver Electronic Agreement

By clicking 'Accept' I agree to the terms and responsibilities defined by the Approver Responsibilities in the PCard or Travel Policy and procedures, including verification of receipts, business purpose and funding used.

Accept Decline

## Mobile App

### **Concur Mobile App**

Concur offers a mobile app which can be used in conjunction with their full, web-based system. Users should be familiar with the workflow and process of the full system before using the Concur App.

#### Benefits of using the app

*Travelers* will have the ability to capture and upload receipts using their smartphone and move transactions to an expense report and process those transactions. Traveler would not submit the report for approval until all expenses have been captured for the trip.

*Expense Approvers* will have a portal to approve trip expenses on their smartphone without needing to be at their workstation.

### **Downloading the App**

The Concur app is free and available to download for Android and iPhone, it may be downloaded from:

- The App Store
- Google Play
- The App Center on your Concur profile

#### *Signing in*

To use the app, you must sign in using your Concur login – this will be your work email, and the password established on the traveler's profile in Concur.

If using the App center and you do not know your password, you may create a pin to use in lieu of a password. To establish pin, under Profile Settings, select Concur Mobile Registration from the menu on the left. An option to create Mobile pin is available.

## Our Information

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## Travel Settings

[Travel Preferences](#)  
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## Expense Settings

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## Other Settings

[E-Receipt Activation](#)  
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[Concur Connect](#)  
[Change Password](#)  
[Travel Vacation Reassignment](#)  
[Concur Mobile Registration](#)

# Concur Mobile

Manage your expenses and business travel on your mobile device.

To get started, enter your email address below and we will send you a link to download the app.

[Get Started](#)

Or, review your sign-in details:

**Username:** sheryl.powell@louisvilleky.gov

**Password:** Use the same password you use to sign in to Concur for Web. If you don't know your password, you may [reset your password](#) or create a [Concur Mobile PIN](#)

Download our free mobile

